

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 27 - Senior Advocacy Services

From: 07/01/2011 To: 06/30/2012

Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Type of Activity					
Interactive Presentations to Public in Person					
Total Number of Events	9	11	8	12	40
Estimated Number of Attendees	285	351	225	412	1,273
Estimated Number of Persons Provided Enrollment Assistance	22	41	12	1	76
Booths or Exhibits at Fairs or Special Events					
Total Number of Events	2	2	1	1	6
Estimated Number of Attendees	330	230	200	5	765
Estimated Number of Persons Provided Enrollment Assistance	30	0	0	0	30
Mobile InfoVan Events					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Dedicated Enrollment Events					
Total Number of Events	1	0	0	1	2
Estimated Number of Attendees	30	0	0	30	60
Estimated Number of Persons Received Any Enrollment Assistance	5	0	0	0	5
Enrollment Assistance with Medicare Programs(s)	2	0	0	0	2
Enrollment Assistance with Part D	2	0	0	0	2
Enrollment Assistance with LIS	1	0	0	0	1
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
Radio Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
TV/Cable Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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Other Print Activity (newspaper articles, fliers, phamplets, etc.)					
Total Number of Print Activities	0	0	1	0	1
Estimated Number of Targeted Persons Reached	0	0	60	0	60
Presenters					
HICAP Paid Staff					
Total Presenters	1	3	3	5	12
Total Hours for Length of Activities	6.00	12.50	10.50	8.00	37.00
HICAP In-Kind Paid Staff					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
HICAP Volunteer Staff					
Total Presenters	6	2	4	1	13
Total Hours for Length of Activities	11.40	4.50	5.40	2.50	23.80
Other Presenters					
Total Presenters	6	9	6	9	30
Total Hours for Length of Activities	7.10	21.10	11.05	23.20	62.45
Area of Focus					
Dual Eligible with Mental Illness	12	12	6	8	
Employer Termination - COBRA	1	0	0	0	1
General HICAP Information	1	1	1	0	3
Grievances / Appeals - Plan Issues	11	13	10	14	48
Long-Term Care / Insurance	0	0	1	0	1
Low Income Subsidy (LIS) / Application Assistance	2	2	3	0	7
Medicare (Parts A & B)	12	11	9	9	41
Medicare Advantage (Part C)	12	13	8	12	45
Medicare Fraud / Abuse	12	13	8	10	43
Medicare Prescription Drug Coverage (Part D)	12	11	6	5	34
Medigap / Medicare Supplements	12	13	8	10	43
Non-Medicare Fraud/Abuse	12	12	8	10	42
Other Topics / Issues (Health Specific)	0	0	1	1	2
	12	13	7	8	40

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	1	1
Preventive Care Benefits	8	10	6	5	29
QMB/SLMB/QI	12	11	7	10	40
Volunteer Recruitment	1	1	3	2	7
Targeted Audience					
African American	3	3	2	4	12
American Indian or Native Alaskan	1	1	0	1	3
Asian Indian	1	1	1	0	3
Caucasian	12	13	10	14	49
Chinese	2	2	1	0	5
Disabled	11	12	8	10	41
Dual Eligible Groups	3	1	3	2	9
Employer Related Groups	1	0	1	3	5
Family Member/Caregiver of Beneficiary	11	12	8	10	41
Filipino	1	3	1	0	5
Guamanian or Chamorro	1	0	0	0	1
Hispanic / Latino	3	3	2	4	12
Hmong	0	0	0	0	0
Japanese	2	3	1	0	6
Korean	1	0	1	0	2
Low Income	11	10	7	9	37
Medicare Beneficiaries	11	13	9	12	45
Medicare Pre-Enrollees	10	12	9	11	42
Mental Health	1	2	2	3	8
Mental Health Professionals	1	2	2	2	7
Native Hawaiian	0	0	0	0	0
Other	2	1	2	5	10
Other Asian	1	2	1	0	4
Other Pacific Islander	0	0	0	0	0
Partnership Outreach	1	0	3	2	6
Presentations to Groups in Language Other than English	0	0	1	1	2
Rural	2	5	2	4	13
Samoan	1	0	0	0	1
Social Work Professionals	9	10	8	9	36
Some Other Race or Ethnicity	0	0	1	2	3
Vietnamese	1	0	1	1	3

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Web Site Hits					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
Literature from Events					
General HICAP Brochure	406	439	307	464	1,616
"Taking Care of Tomorrow"	0	0	0	0	0
Other Publications (Created by or on Behalf of Local HICAP)	942	1,444	690	897	3,973
Other Literature					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	0	0	0

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Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
SECTION 1 - Client Contacts					
Total Clients Counseled (unduplicated)	325	776	472	435	2,008
Total Finalized Intakes	136	256	164	196	752
How did client learn about SHIP/HICAP?					
Agency (Social Security, Medi-Cal, etc.)	41	62	37	46	186
Aging into Medicare Postacd - CDA HICAP	28	1	0	1	30
CDA HICAP	4	1	0	2	7
CHA	0	0	1	1	2
CMS/Medicare	2	21	5	10	38
Friend/Relative	15	28	24	54	121
InfoVan	0	0	0	0	0
Internet	3	3	2	2	10
Mailings	1	3	1	2	7
Media	1	0	3	0	4
Other	23	35	42	28	128
Presentations	0	14	2	12	28
Previous Contacts	10	71	36	26	143
State Website	0	1	0	0	1
Missing/Not Collected	8	16	11	12	47
Mode of Client Contact					
Quick Call Contacts	234	684	431	519	1,868
Contacts by Telephone	37	56	48	153	294
Contacts In Person at home	1	3	2	0	6
Contacts In Person at site	104	197	122	168	591
Contacts by E-Mail	2	3	2	10	17
Contacts by Mail/Fax	6	8	10	21	45
Total Number of Client Contacts:	384	951	615	871	2,821
Contact Status Types					
General info	81	74	84	233	472
Detailed Assistance	64	168	93	178	503
Problem Solving/Resolution	17	43	35	193	288
Total Counseling Time Spent by Counselor Type					
Program Manager	5.00	69.00	10.45	41.10	125.55
Volunteer	57.20	81.30	28.00	131.25	297.75
Paid	7.30	0.30	29.30	1.30	38.20
In-Kind	0.00	0.00	0.00	0.00	0.00
SECTION 2 - Client Demographics					
Ethnicity					
(Hispanic/Latino)	5	3	5	0	13
Race					
African American/Black	0	1	1	1	3

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Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	3	0	1	4
Caucasian/White	48	84	93	70	295
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	0	3	0	0	3
Filipino	0	0	1	0	1
Japanese	0	0	1	0	1
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	5	1	0	0	6
Other Pacific Islander	0	1	0	0	1
Other Asian	0	1	0	4	5
Two or More Race	0	1	0	0	1
Some Other race	2	1	2	0	5
Not Collected	81	160	66	120	427
Gender					
Female	71	155	88	106	420
Male	48	58	57	55	218
Not Collected	17	43	19	35	114
Monthly Income					
Less than 150% of FPL	14	31	32	35	112
Equal To/Greater than 150% of FPL	42	70	56	56	224
Not collected	80	155	76	105	416
Client Asset Limits					
Below LIS Asset limit	8	15	15	13	51
At or Above LIS Asset Limit	4	3	3	9	19
Not Collected	124	238	146	174	682

From: 07/01/2011 To: 06/30/2012

Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Total Clients that Checked Yes as Being					
Veteran	9	8	3	8	28
Limited English Proficient (LEP)	3	3	3	2	11
Dual Eligible	6	19	20	37	82
Medicare Status Due to Disability	9	22	19	42	92
Dual Eligible due to Mental Disability	2	1	0	6	9
Applying/Receiving Social Security/Medicare Disability	16	31	24	51	122
Age					
Under 60	9	14	13	11	47
60-64	3	12	14	34	63
65-74	85	89	65	48	287
75-84	11	46	29	12	98
85+	0	22	8	8	38
Not Collected	28	73	35	83	219
Marital Status					
Married	28	44	39	33	144
Never Married	6	10	10	12	38
Separated	0	0	1	0	1
Divorced	7	20	12	17	56
Widowed	4	24	16	14	58
Domestic Partner	1	1	0	2	4
Not Collected	90	157	86	118	451
Estimated Financial Saving					
Clients with Financial Savings	22	29	22	43	116
Estimated Dollars Saved	\$16,939.46	\$19,800.00	\$19,439.82	\$56,210.00	\$112,389.28

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	20	28	49	80	177
Benefit Comparisons/Explanation/Coverge Changes	48	50	62	79	239
Appeals/Grievances	1	1	2	6	10
Billings/Claims	2	0	4	11	17
Fraud/Abuse	2	0	14	57	73
Quality of Care	0	0	0	4	4
LTC/LTCI					
Enrollment/Eligibility Assistance	4	4	2	6	16
Billings/Claims	0	0	0	1	1
LTC Partnership	0	2	3	0	5
Appeal/Greivances	0	0	0	2	2
Fraud/Abuse	0	0	0	3	3
Other LTC	0	5	5	9	19
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	16	37	43	71	167
Benefit Explanation	45	73	67	74	259
Appeals/Grievances	0	0	0	1	1
Billings/Claims	2	2	1	5	10
Fraud/Abuse	0	0	0	41	41
Disenrollment/Coverage Changes	1	2	3	3	9
Quality of Care	0	0	0	4	4
Plan Comparison	4	32	31	43	110
Marketing/Sales Complaints/Issues	0	0	1	2	3
Plan Non Renewal	0	1	0	0	1
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	19	39	49	63	170
Benefit Explanation	45	76	65	71	257
Appeals/Grievances	0	1	4	1	6
Billings/Claims	1	0	1	2	4
Fraud/Abuse	0	0	0	35	35
Coverage Changes/Disenrollment	4	7	4	1	16
Plan Non Renewal	4	24	3	1	32
Plan Comparison	4	37	34	34	109
Enrollment/Enrollment Asistance	3	2	3	31	39
Quality of Care	2	0	0	5	7
Marketing/Sales Complaints or Issues	0	0	1	0	1
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	4	0	10	20	34
Medi-Cal Application Assistance	4	1	5	16	26

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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	9	14	19	23	65
MSP Application Assistance	6	3	8	9	26
Medi-Cal/QMB Claims	1	1	1	13	16
Fraud/Abuse	0	0	0	7	7
Other	7	3	2	6	18
Other					
Employer/Federal Health Benefits (FEHB)	9	13	20	19	61
Military Benefits	5	2	0	2	9
COBRA	1	1	1	3	6
Mental Health Topics	0	0	0	0	0
Fraud/Abuse	0	0	0	2	2
Other Health Insurance	4	4	2	3	13
Other	0	1	1	6	8
Part D - Medicare Prescription Drug Coverage					
Benefit Explanation	52	92	75	86	305
Eligibility/Screening	14	36	37	66	153
Plan Comparison	9	65	53	53	180
Enrollment/Anrollment Assistance	3	32	15	48	98
Billings/Claims	1	1	3	2	7
Coverage Changes	2	5	2	4	13
Re-enrollment	0	0	0	1	1
Disenrollment	0	0	0	0	0
TROOP	0	0	0	1	1
Other	0	11	0	3	14
LIS / Extra Help					
Eligibility / Screening	20	41	42	52	155
Benefit Explanation	13	30	32	38	113
Application Assistance	12	19	24	35	90
Claims/Billings	0	1	0	1	2
Appeals / Grievances	0	0	0	0	0
Other Prescription Drug CoveragePlans					
Union/employer	4	3	4	3	14
PPARx	0	0	0	0	0
Military Drug Benefit	2	2	0	3	7
Manufacturer Program	1	0	0	0	1
Other	8	10	1	1	20
Part D Plan Problems					
(Non-Compliance Services Unmet)					
Eligibility	0	0	2	1	3
Lag Time	0	0	0	0	0
Multiple Enrollment	0	0	0	0	0
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	0	0	0	0	0

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	1	2	0	0	3
Dosage problem	0	0	0	0	0
Data problems	0	0	0	0	0
Delay in medications	0	0	0	0	0
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	0	0	0
Client reached donut hole	0	0	0	0	0
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	0	0	0	0
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	1	0	0	1
HICAP Legal Services					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Part D Complaints Filed					
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
Part D Plan:	0	0	0	0	0
SMP:	0	0	0	0	0
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	0	0	0	0
Other:	0	1	0	0	1
TOTAL MEDICARE PART D COMPLAINTS	0	1	0	0	1
All Other Complaints					
APS :	0	0	0	0	0
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	0	0	0	0	0
TOTAL ALL OTHER COMPLAINTS	0	0	0	0	0
800 Medicare Line Issues					
Total number of Calls with Issues	4	6	2	0	12
Total duration of calls	1.15	0.00	0.15	0.00	1.30